

Staff performance appraisal

Name Katrina Chalk	Position Clerk to the Council and Responsible Financial Officer RFO	Length of service 13 years (September 2007)
Date 1 st December 2020	Appraisers: Cllrs Charlotte Copeman (Chairperson) and Lesley Pugh	

Part A. Appraisee to complete before the interview

A1 State your understanding of your main duties and responsibilities

To provide administrative support and advice for the council's activities/responsibilities:

As RFO to manage the finances of the Council including: the preparation of annual budgets: the monitoring and balancing of the Council's accounts: The maintenance of all records including, those for audit, VAT purposes; the receipt of payments due to the Council; implementation of systems of internal financial control. To prepare year end accounts and all the documentation required by the Internal and External Auditors.

Preparation and issuing of all agendas, minuting full council meetings (11 meetings per year, plus any extra ordinary meetings called) and some of the committee meetings (Planning, Amenities and Finance Committee Meetings); implementing actions and follows ups as required.

To build effective relationships with the public, local authorities and outside bodies and organisations.

To support the Council with any Tendering procedures, risk assessments, financial procedures and adhere to the Council's Standing Orders.

Giving guidance and informing council as to whether decisions are lawful & can be implemented.

Overseeing the running and maintenance of the public toilets, supporting the caretakers in their work.

Management of Public Toilet Caretaker.

To oversee Auto enrolment and liaise with The Pension Regulator and HMRC as and when required.

To regularly liaise with the Contractor who works at the Playingfield, Cenotaph and Cemetery.

To maintain accurate and up to date cemetery records, meet with members of the public in relation to burials and reservation of plots.

To receive correspondence and documents on behalf of the Council and to deal with correspondence and documents or bring such items to the attention of the Council.

Reporting Highways repairs and maintenance to the Local Authorities.

Uploading documents onto the Council website and ensuring updated documents are on file.

Within the role of Clerk and Responsible Financial Officer it is necessary to exercise initiative and take independent action and be able to prioritise my workload.

A2 Discussion points

1. Has the past year been good/bad/satisfactory for you and why?

2020 has been an unusual year. Some of the tasks I have undertaken have given me an immense amount of job satisfaction (supporting the Chair and Cllr Whittaker with the initial response to Covid 19), but some tasks have been made harder due to Covid 19, maintaining a clear financial audit trail whilst restrictions have been in place.

2. What do you consider to be your most important achievements of the past year?

Keeping the office ticking over during the pandemic and seeing the new toilet installed at Playingfield.

It was also agreed to add the following achievements:

- **Management of Sandy during pandemic, very skilfully and empathetically done**
- **Grant applications success**

3. What elements of your job do you find most difficult?

I feel very responsible in relation to the accounts and the allocation/spending of public money, I think this may be due to having no previous experience prior to this role. I expect this will always be the element of the job I find most challenging and worrying.

4. What elements of your job interest you the most and least?

I find all aspects interesting, some are a little more challenging than others.

5. What do you consider to be your most important aims and tasks in the next year?

The aims of the Clerk will depend on where we are with Covid and restrictions in place.

If the current restrictions are lifted:

- To be involved in the organising and running of more community events i.e. volunteer litter picking etc.
- To encourage more community cohesion, in person, face to face.

6. What training/experience would benefit you in the next year?

I think I should attend more cpd courses and the annual One Voice Wales and SLCC Conference.

I would also like to have some additional training/support on Scribe software.

A3. Score your own capability or knowledge in the following areas in terms of your current role. (1-3 =poor, 4-6=satisfactory, 7-9=good, 10=excellent)

1. Time management 8
2. Reporting and administration 8
3. Communication skills 8
4. IT skills 8
5. Meeting deadlines/commitments 9
6. Problem solving and decision making 8
7. Steadiness under pressure 7
8. Adaptability and flexibility 8

Part B To be completed during the appraisal by the appraisers.

B1. Review the post holder's job description and compare with self appraisal entry in

A1. Clarify job purpose and priorities where necessary.

- Finance
- Meetings and actions from them
- Preparation for precept meeting

B2. Review the completed discussion points in A2 and note the points of discussion and action.

In an extremely difficult year Katrina is to be commended on how she has continued to carry out her role so successfully, despite everything.

To alleviate the stress of the role, the following was discussed:

- More CPD / training in finance
- Encourage more engagement on tasks from Councillors where possible to try to lessen the load for Katrina

B3. Look at the objectives set out in the previous appraisal and against each comment on achievement or otherwise. Discuss the self appraisal in A3 and note any points of significance.

All the objectives set in 2019 have been achieved,

B4 Discuss objectives for the next year

1. Increase community cohesion via **volunteer group** (carry over from 2019/20 due to Covid)
2. Getting more of a handle on the accounts – via training, assistance from Scribe

B5 Other issues (to be covered separately outside the appraisal, continue on a separate sheet if necessary).

Ensure IT system, especially back up to cloud, is appropriate for needs
More CPD to help with finance skills

Signed appraisee:

Appraisers

Date